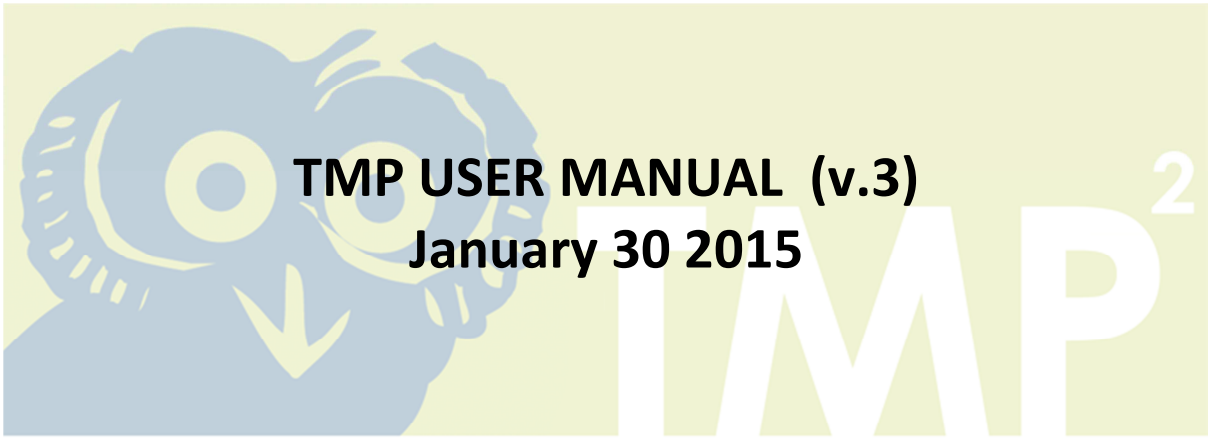

TMP USER MANUAL (v.3)
January 30 2015

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1. Introduction

The TMP user manual gives an overview of the development principles and current functionalities of the TMP. The manual will guide the user through the process of thesaurus and concept management, export and import functionalities and mapping procedures.

The TMP is a work in progress! This means that the user manual will be updated regularly until the production version due in January 2015 (D4.5).

2. Theoretical Principles

The TMP is developed with the "OTe for Thesaurus" development tool. OTe stands for "OntoTerminological engine".

The notion of ontoterminology takes into account terminologies whose conceptual model is a formal ontology. The ontology refers to computational reasoning and a formal representation of concepts, whereas a terminology shows linguistic and multilingual variations. An "ontoterm" combines both the term definition and the concept definition.

The OTe can represent hierarchical relations as is-a (**BTG**, **NTG**), part-of (**BTP**, **NTP**) and instance-of (proper name, **BTI**, **NTI**). The relations have logical properties: strict order (is-a), acyclic (is-a, part-of) and logical restraints (no specialisation (NTG) neither instantiation (NTI) of individuals).

The TMP is fully RDF-based but makes use of interchange formats such as SKOS and OWL.

Specification sources used are: ontoterminology for thesaurus, ISO 1087-1 & ISO 704, ISO 25964-1 & ISO 25964-2 and W3C for RDF, SKOS and OWL formats.

3. URL

The TMP is accessible on: http://athenaplus.thesaurus.condillac.org

4. Homepage

The homepage displays following logos: the logo of the TMP² and OTeforThesaurus in the top left corner. In the left corner at the bottom you can see the logos of Europeana, LinkedHeritage and AthenaPlus. The OTeforThesaurus logo is repeated in the right corner at the bottom.

It displays the version number (V2.1.10 2015-02-13) and a link to the site of the Équipe de Condillac (University of Savoie).

When you are not logged in, the homepage displays all imported and created thesauri set as public. Each thesaurus is described in three metadata types. Two are obligatory when importing or creating a thesaurus: the **title** (defined by the creator) and the **author** (automatically set as the creator of the thesaurus, but can be altered). The thesaurus can be illustrated with an **image**.

The thesauri can be displayed on the homepage as a **grid with images** or as a **flat list**, organised alphabetically according to title.

When you are not logged in, the only functionalities available are "**view**" (represented by a button with a symbol of an eye) and "**search"**. Clicking the eye-symbol allows you to view the linguistic and conceptual pane of the thesaurus and to scroll through the concepts. To go back to the homepage, you can click on the "**public thesauri**"-tab.

You can search for public thesauri displayed on the homepage in the "**search**"-field. You can search the thesaurus **metadata** (title, author, description, coverage, subject, publisher and language) and you can also search for thesaurus **concepts**.

The homepage also displays a tab "**Create thesaurus**" and "**Import Thesaurus**". At the moment, only the "Create thesaurus" is developed and can be used. For importing vocabularies, we refer to the **Importing thesauri**-chapter.

5. Creating and Editing

In the right corner you can enter a login and password to access the TMP. When you scroll over the "**connect**"-button a message for an account request appears: "Login request? Send a message to luc.damas@univ-savoie.fr".

5.1 My Thesauri vs Other Thesauri

Once logged in you can see a change in the layout of the homepage. Instead of showing all public thesauri in one frame, there is now a separation between "**My thesauri**" and "**Public thesauri**". "My thesauri" displays the thesauri that were created or uploaded by yourself (all rights). "Public thesauri" all the other thesauri that are in the TMP (limited rights). You have full user rights in "My thesauri" and limited rights in "Other thesauri".

"My thesauri" comes with two buttons represented by a symbol: a pencil and a cogwheel. The pencil with "**edit**" leads you to the editing page; when you select the cogwheel you are able to **export** (in SKOS, Json, PDF), to **manage you rights** and to **delete**. At the moment only the editing and delete functions are developed.

5.2 Linguistic and Conceptual pane

The editing page is divided into a "linguistic pane" on the left and a "conceptual" pane on the right, following the ISO and OTe for Thesaurus principles. The right pane displays the complete thesaurus and all the concepts it contains in a specific language (in tree view or in an alphabetical list). Here you can add or delete concepts. The left pane displays the translations, the preferred and non-preferred terms, the hierarchical and mapping relations, the scope notes, links to external resources etc.

You can edit the linguistic and conceptual parts of the thesauri (concepts, images, relations etc.).

5.3 Creating a thesaurus

A tab "**Create thesaurus**" allows you to create a thesaurus. When clicking it, a field with "**Thesaurus title?**" must be filled in, then click the OK-button. The new thesaurus appears immediately on the homepage. Click on the "**edit**"-button and you can edit your metadata and start creating your thesaurus. The metadata in the metadata box are listed below. Reference for some metadata and definitions is the DC Metadata Element Set (06/2014).

Metadata	Definition	Remarks / Example
Author	Creator or importer of the thesaurus	Automatically set when user is creating or importing a thesaurus.
Coverage	The spatial or temporal topic of the resource, the spatial applicability of the resource, or the jurisdiction under which the resource is relevant.	A geographical location, specific time frame or historical period, e.g. "Applied arts in Victorian period", "Prehistoric vessels from Mesopotamia".
Description	An account of the resource	Free-text account of the resource, a table of contents etc.
Languages	A language of the resource.	Select the languages of the thesaurus. Languages can also be added and deleted later on.
Publisher	An entity responsible for making the resource available.	E.g.: ICCU, The National Library of France, Library of Congress.
Rights	Information about rights held in and over the resource.	Description of the propriety rights claimed for using the resource. (Specific rights will be added in a later version of the TMP).
Subject	The topic of the resource.	E.g. Applied arts, archaeology, art and art history, biology, information sciences.
Creation date	Date of the creation of the thesaurus or when the thesaurus was uploaded	Automatic display.

The editing box also displays the **URI** of the thesaurus. Clicking on it leads you to the Json-format of your thesaurus where it can be retrieved.

You can add an **image** by clicking the "**modify**"-button under the image box and by selecting a JPEG-image in your folders.

5.4 Editing a thesaurus

The editing page shows two panes on the left and on the right. The left pane shows the thesaurus with the terms it contains in a specific language. The right pane shows the conceptual dimension of the concept: the hierarchical, associative and equivalent relations, the preferred and non-preferred terms or descriptors, the links to external resources etc.

In the left pane terms can be added by clicking the "**+**"-button ("**new root concept**") and can be deleted by clicking the "**-**"-button ("**delete concept**"). You can also immediately **add a narrower term** (generic narrower term) by clicking the appropriate symbol. A list of **new root concepts** can also be added to the thesaurus by entering a range of concepts separated by a comma.

You can change the language by scrolling the drop-down list.

To add a concept, enter a concept name by clicking "**+**" and click the OK-button. In the right pane you can see that the new concept is regarded as the "**Preferred term**". If this is not correct you can change it with the editing-button. You can also insert a "**Non-preferred term**".

Preferred term	Descriptor, represents a concept when indexing	E.g. Mammalia (class)
Non-preferred term	Non-descriptor, not assigned to documents but simple entry point	E.g. Mammals

To add a translation of a concept you will have to select the target language in the right pane and add the concept to the "preferred term"-field. E.g. My thesaurus has the concept "book" and I want to translate this concept into Spanish. I select "es" in the drop-down list in the right pane and add "libro" in the "preferred term"-field.

Both in the left and in the right pane it is possible to change the language by selecting a language in a drop-down list (UN country codes). When the left pane displays terms in *italic*, this means that the concept has not yet been translated in the selected language.

Each concept can be illustrated by a JPEG-format image.

5.5 Defining hierarchical relations

In the left panel you can add relations to the concept. You can add "**broader**" and "**narrower**" relations (BT or NT). If you want to add a simple broader relation to your concept: choose "**BT**" from the drop-down list. The concepts that can be selected as BT are ordered alphabetically in the pop-up

box. The concepts can be alphabetically filtered in the "**Filter**-" field. Choose one and click the "OK"-button. The relation between the selected concepts is automatically defined as BT or NT.

ISO25964-norms define different types of hierarchical relations: **generic** ("sort of / type of"), **whole-part** ("is part of") and **instance** ("is instance of"). These relations can also be captured in the TMP by selecting the correct BT (**BTI, BTG** or **BTP**) in the drop down list. Concepts are linked following the ISO-standard, e.g. "KMKG" BTI Museums teams – and KMKG is defined as a "**proper name**".

Hierarchical relation	Acronym	Description	Example
Broader simple relation Narrower simple relation	BT NT	A concept is more specific then another.	cat BT mammal mammal NT cat
Generic hierarchical relation	BTG NTG	A concept is a type of / a sort of another concept.	Siamese cat BTG cat cat NTG Siamese cat
Whole-part hierarchical relation	BTP NTP	A concept is part of another concept.	tail BTP cat cat NTP tail
Instantial hierarchical relation	BTI NTI	A proper name is an instance of a concept.	Bastet BTI cat cat NTI Bastet

5.6 Defining associative relations

Associative relations can be added by selecting the correct concept from your thesaurus. Concepts can be filtered alphabetically.

Associative relation	Acronym	Description	Example
Related terms	RT	A concept is not hierarchically, but semantically related to another concept in the same thesaurus.	predator RT cat

5.7 Adding notes

You can add notes to the concepts in your thesaurus. All the documentation properties supported by SKOS are available in the TMP. To add a **note**, click on the "+"-sign next to "**note**" and choose the preferred note type. Notes can be added, altered and deleted at any time.

Type of note	Description (SKOS-primer)	Example
Change note	Documents fine-grained changes to a concept, for the purposes of administration and maintenance.	"cat" moved from "mammals"- to "feline"-category.
Definition	Supplies a complete explanation of the intended meaning of a concept.	*Felis catus, family Felidae* (the cat family); it was probably domesticated in ancient Egypt from the local race of wildcat. The cat family also includes the ocelot, serval, margay, lynx, and the big cats (Oxford Dictionary)
Editorial note	Supplies information that is an aid to administrative housekeeping, such as reminders of editorial work still to be done, or warnings in	Check with curator if "Sjabti" or "Ushabti" is the correct spelling.

	the event that future editorial changes might be made.	
Example	Supplies an example of the use of a concept.	"Felines" such as panthers, cats, tigers etc.
History note	Describes significant changes to the meaning or the form of a concept.	"Bastet": used to be "Bast", goddess of warfare in Lower Egypt.
Scope note	Supplies some, possibly partial, information about the intended meaning of a concept, especially as an indication of how the use of a concept is limited in indexing practice.	"Vase": Vessels of varying shape and size but which are usually taller than they are wide and which are often cylindrical. Used mainly to hold flowers or for ornamental purposes.

5.8 Linking with external resources

It will be possible to add URIs from external resources to concepts in your thesaurus. At the moment, this feature is still under development.

At the moment an automatic request is made to DBPedia: extracts from the English DBPedia are published in the conceptual pane and can be deleted.

6. Mapping

The "**start mapping**" symbol in the editing page allows you to define relations between different thesauri. When you click on it, a tab opens with an overview of all public thesauri. Choose the thesauri you want to link with by clicking the "**map**"-button shown in every thesaurus box.

The mapping page then displays the proprietor thesaurus on the left side and the other thesaurus on the right side. To set the link: click on a concept on the left side and click on the equivalent concept on the right side, e.g. "Germany" with "Deutschland". A list appears with ISO-norm symbols for equivalences: **=EQ** (exact equivalence) and **~EQ** (inexact equivalence). =EQ and ~EQ correspond respectively to **skos:exactMatch** and **skos:closeMatch**. You can also map concepts by defining them as broader (**BM**), narrower (**NM**) and related (**RM**).

Equivalence relation	Acronym	Description	Example
Exact equivalence	=EQ	Exact simple equivalence (SKOS exact match)	Mammal [EN] *=EQ* mammifère [FR] Church [EN] *=EQ* Église [FR]
Inexact equivalence	~EQ	Inexact simple equivalence (SKOS close match)	Cat [EN] *~EQ* félin [FR] Top hat [EN] *~EQ* hat [EN]
Broader mapping	BM	Hierarchical mapping : narrower to broader (SKOS broader match)	Cat [EN] *BM* mammifère [FR]
Narrower mapping	NM	Hierarchical mapping : broader to narrower (SKOS narrower match)	Chat [Fr] *NM* tomcat [EN]
Related mapping	RM	Associative mapping: related concepts (SKOS related match)	tomcat RM predator

To **delete a mapping** select the mapped concepts in the two thesauri. A pop-up “remove” will appear. Click on the “remove”-button and the mapping is deleted.

To end and save the mapping, don’t forget to click on the **Stop mapping**-symbol.

7. Importing thesauri

It will be possible to import thesauri yourselves in the TMP. However, at the moment you need to send your file to the administrator who will import your thesaurus. The automatic import relies on the OTe and will control all data.

A SKOS-file will be analysed by the administrator and imported in batch.

When you do not have a SKOS-version of your thesaurus, you can import a thesaurus by creating a CSV-file. A CSV-file needs preliminary work that you will have to do yourselves. You will have to create a file (Excel) that is clear enough for the administrator to transform into SKOS. Each concept and every relation in your thesaurus needs to be defined. You will need to define for each thesaurus term: the ID (if you have a unique number or code for each concept), the broader / narrower terms, preferred terms, alternative terms, scope notes etc. See the example below:

ID	Broader term	Preferred term English	Preferred term French	Scope note English
300028051	900032296	Book	Livre	Collections of wood or ivory tablets, or sheets of paper, parchment, or similar material, that are blank, written on, or printed, and are strung or bound together; commonly many folded and bound sheets containing continuous printing or writing; especially, when printed, a bound volume, or a volume of some size (AAT).

For more information or for an example, please contact Eva Coudyzer.

8. Exporting thesauri

You can export your thesaurus in SKOS, Json and RDF.

The thesauri can be exported by selecting the “Export” button that appears when clicking the cogwheel symbol (in your thesaurus box) on the homepage.

9. Information for users

On the homepage you can find:

- A leaflet **TMP in a nutshell** which explains in short the theoretical principle and practical functionalities of the TMP.
- The latest version of the **user manual**.
- A **lexicon** with an explanation of frequently used (technical) terms and concepts.
- A page with frequently asked questions or **F.A.Q**.

10. Contact

Feedback

In case of questions, bug-reporting, feedback etc., please send a mail to: e.coudyzer@kmkg-mrah.be

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